

Message Text

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ACTION EA-12

INFO OCT-01 EB-08 ISO-00 /021 W
-----119263 280953Z /10
P 280850Z JUL 78
FM AMEMBASSY TAIPEI
TO USDOC WASHDC PRIORITY
INFO SECSTATE WASHDC 8321

UNCLAS SECTION 01 OF 06 TAIPEI 04922

FOR BED/OIM/MRD
BED/OIM/EA

E.O. 11652: NA
TAGS: BBSR, TW
SUBJECT: GLOBAL MARKET RESEARCH - GRAPHIC INDUSTRIES
- EQUIPMENT, ROC

REF.: USDOC 12839

1. FOLLOWING IS INFORMATION AS SUPPLIED BY CONTRACTOR
IN RESPONSE TO POINTS RAISED REFTEL ON 1) OFFICIAL 1975
IMPORT STATISTICS, 2) MAJOR SUPPLIERS, 3) END-USER
SECTORS, 4) NUMBER OF COMPANIES AND NUMBER OF WORKERS,
5) NUMBER OF FIRMS AND NUMBER OF TITLES:

QUOTE:

I. STATISTICAL INCONSISTENCIES OF 1975 IMPORTS

AFTER RE-CHECKING OUR SOURCE OF INFORMATION - FOREIGN
EXCHANGE SETTLEMENTS, COMPILED BY THE CENTRAL BANK OF
CHINA - AND AFTER CONSULTATIONS WITH CUSTOMS OFFICIALS
AND CONCERNED EXPERTS, RECONCILIATIONS ARE SHOWN IN
TABLES 1, 2, 3 AND 4. REASONS FOR THE RECONCILIATION
ARE AS FOLLOWS:
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A. SOME PRINTING EQUIPMENT WERE IMPORTED AS SCRAP IRON
OR IN KNOCK-DOWN FORM OR IN SOME OTHER NAMES TO EVADE
TAXES. EXPORT STATISTICS IN THE SUPPLYING COUNTRY ARE
SHOWN AS PRINTING EQUIPMENT, BUT THE IMPORTING COUNTRY
MAY ENTER THE ITEM IN SOME OTHER TITLE. FOR INSTANCE,
IN ORDER TO DIVERSIFY SOURCES OF IMPORTS, LOCAL

GOVERNMENT HAS REQUIRED SOME EQUIPMENT BE IMPORTED FROM US AND EUROPE. HOWEVER, LOCAL EQUIPMENT USERS ARE USED TO USING JAPANESE MACHINES, SO SOME MACHINERY WAS FIRST EXPORTED BY JAPAN TO EUROPE IN KNOCK-DOWN FORM AND RE-IMPORTED TO TAIWAN AS SCRAP IRON OR IN SOME OTHER NAMES.

B. BTN TARIFF AND CCC CODE ARE IN SOME CASES INCOMPATIBLE AND OUR SOURCE OF INFORMATION FOR THIS SURVEY USED CCC CODE.

II. SUPPLIERS: US, JAPAN, AND WEST GERMANY

LIST OF MAJOR US SUPPLIERS AND THEIR PRODUCTS

NAME OF SUPPLIER	PRODUCTS
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1. HARRIS CORP.	WEB OFFSET PRESS
-	LETTERPRESS OFFSET
-	OFFSET NEWSPAPER

2. MACBETH, DIVISION OF	DENSITOMETER
- KOLLMORGEN CORP.	LIGHTING EQUIPMENT

3. SCHMUTZ MANUFACTURING CO.	MULTICOLOR PROCESS FOR
-	PRINTING

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4. GOSS	WEB OFFSET PRESS
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5. PRINTING PRODUCTS DIVISION, LITHOGRAPHIC PLATE MAKING	
- 3M CO.	EQUIPMENT

6. ROCKWELL	GRAPHIC EQUIPMENT
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LIST OF MAJOR JAPANESE SUPPLIERS AND THEIR PRODUCTS

NAME OF SUPPLIER	PRODUCTS
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1. DAINIPPON SCREEN CO.	AUTOMATIC FILM PROCESSOR
-	GRAPHIC ARTS MECHANICAL
-	EQUIPMENT
-	VACUUM PRINTING FRAME

2. KOMORI	GRAVURE PRINTING PRESS
-	AUTOMATIC HIGH SPEED
-	OFFSET PRESS

3. AKIYAMA	HIGH SPEED OFFSET PRESS
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4. MITSUBISHI CORP. OFFSET PRINTING PRESS
- AND RELATED EQUIPMENT
5. RYOBI CO. PHOTO TYPESETTING MACHINE
6. HAMADA HIGH SPEED OFFSET PRESS

LIST OF MAJOR GERMAN SUPPLIERS AND THEIR PRODUCTS

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NAME OF SUPPLIER	PRODUCTS
------------------	----------

- | | |
|----------------------|----------------------------|
| 1. HEIDELBERG CORP. | AUTOMATIC PLATENS |
| - | MISCELLANEOUS RELIEF |
| - | PRESS AND OFFSET PRESS |
| | |
| 2. ROLAND OFFSET CO. | OFFSET PRINTING PRESS |
| | |
| 3. HELL CO. | ELECTRONIC LASER SCANNER |
| | |
| 4. KLIMSCH | MISCELLANEOUS OFFSET |
| - | PRINTING PRESS AND RELATED |
| - | EQUIPMENT |

III. A. IN TABLE 4, EXPENDITURES FOR GRAPHIC INDUSTRIES EQUIPMENT TOTALED DOL\$5,256,000 WHICH WAS LESS THAN HALF THE MARKET SIZE FOR 1976 AS SHOWN IN TABLE 1. THIS IS REASONABLE BECAUSE:

1. AVERAGE LENGTH OF SERVICE OF PRINTING EQUIPMENT IS 4-10 YEARS. IN SOME CASES, IMPORTED GERMAN-MADE HEIDELBERG PRINTING MACHINE IS IN GOOD CONDITION AFTER MORE THAN 20 YEARS OF SERVICE. THEREFORE,

ANNUAL AMORTIZATION OF COST FOR LARGE SIZED OR
AUTOMATIC MACHINERY IS NO MORE THAN 10-25 OF
TOTAL COST. OF THE 1976 MARKET SIZE DOLS13,179,000,
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DOLS11,377,000 WAS IMPORTED EQUIPMENT ACCOUNTING FOR
86.21. OVER 90 OF THE DOLS11,377,000 WAS SPENT
ON PRECISION AND AUTOMATIC EQUIPMENT. ANNUAL
EXPENDITURES ON EQUIPMENT SHOULD BE DOLS1,300,000 -
DOLS3,300,000 IN THE YEAR, BASED ON EXPERIENCES OF
THE USERS. THE FIGURE IS IN FACT MUCH BIGGER AS
BOOKED IN ACCOUNTS OF THE EQUIPMENT USERS, AS IT IS
MORE ADVANTAGEOUS TO SHORTEN THE LIFE SPAN TO REDUCE
TAX BURDEN. ADDING OTHER EXPENDITURE ON AUXILIARY
EQUIPMENT, THE 1976 EXPENDITURE FOR GRAPHIC INDUSTRIES
EQUIPMENT SHOULD REASONABLY TOTAL AROUND DOLS5,256,000.
THIS FIGURE COMES FROM THE REPUBLIC OF CHINA REPORT
ON INDUSTRIAL & COMMERCIAL SURVEYS, MINISTRY OF
ECONOMIC AFFAIRS, 1976.

B. SPECIAL PRINTING INCLUDES COMMERCIAL PRINTING,
PACKAGE PRINTING AND IN-PLANT PRINTING, SUCH AS
SELF-ADHESIVE TAG, PLASTIC TAG, PLASTIC BAG FOR
PACKAGINGS, CAN-PRINTING AND SOME PRINTING PLANTS
OPERATED FOR THEIR OWN USE BY LARGE FOOD AND GARMENT
CONCERNS.

IV. THE NUMBER OF FIRMS IN TABLE 5 IS BASED ON
COMMERCIAL AND INDUSTRIAL SURVEY REPORT COMPILED BY
MINISTRY OF ECONOMIC AFFAIRES, 1976, PAGE 47, WHILE
THAT SHOWN IN THE PARAGRAPH - PRINCIPAL END USERS
SECTORS - CAME FROM PUBLICATION YEARBOOK, 1977. THE
FORMER SOURCE INDICATES THERE WERE 6,442 PRINTING
FIRMS IN 1975, WHILE THE TABULAR SAYS SUCH FIRMS
TOTALED 7,279 IN 1976. IN OTHER WORDS, THERE WERE
837 NEW FIRMS JOINED THE MARKET COMPETITION FROM
1975 TO 1976. AS FOR THE NO. OF FIRMS ON PAGE 51,
IT WAS BASED ON INDUSTRIAL & COMMERCIAL SURVEY
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REPORT PUBLISHED IN 1975 AND THE FIGURE WAS 1974'S.
BECAUSE THERE WAS NO STATISTICAL DATA OF EMPLOYEES
AFTER 1975 IN ALL THE AVAILABLE SOURCES OF SECONDARY
DATA, THE REPORT COULD ONLY BE BASED ON 1975. FOOTNOTE
ON THE SAME PAGE WAS AN INDUCTION BASED ON RESULTS
OF INTERVIEWS. IN 1974 THE YEAR OF RECESSION, TAIWAN

HAD 3,380 PRINTING FIRMS (SEE TABLE 7). THE FIGURE SHOWED AN INCREASE TO 6,442 TILL 1975 (SEE TABLE 5) AND AGAIN TO 7,279 IN 1976. IN ADDITION TO MANY BOOK, MAGAZINE OR PUBLICATION FIRMS WHICH HAD THEIR PRINTING WORKS DONE BY PRINTING SERVICE INDUSTRIES ON CONTRACT BASIS, THE DIFFERENT FIGURES IN DIFFERENT YEARS ARE A MATTER OF COURSE.

V. A. ACCORDING TO LOCAL REGULATIONS GOVERNING NEWSPAPERS AND MAGAZINES, A NEWS MEDIUM WHEN APPLYING FOR REGISTRATION MUST CLEARLY MANIFEST ITS PURPOSE, NATURE AND SCOPE OF OPERATIONS. THE EXISTING 31 NEWSPAPER COMPANIES HAVE EACH PUBLISHED A NEWSPAPER SINCE 1952, (SEE PAGE 53, NEWSPAPERS). DURING THE PERIOD, REGARDLESS OF CHANGES OF SOME NAMES OR ORGANIZATIONS, THIS CONDITION HAS REMAINED UNCHANGED.

B. THERE HAVE BEEN MANY MAGAZINE PUBLISHERS IN TAIWAN WHICH ARE REGISTERED BUT HAVE NEVER PUBLISHED ANY MAGAZINE OR HAVE SUSPENDED OPERATION. THE PRESENT NUMBER OF MAGAZINES INDICATES THOSE HAVE KEPT PUBLISHING PERIODICALLY. THOSE SUSPENDED OR NOT PUBLISHING AT ALL ARE EXCLUDED.

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UNQUOTE.

2. CONTRACTOR'S REVISIONS OF 1975 STATISTICS IN
TABLE 1, 2, AND 3 ARE THE FOLLOWING ONLY:

TABLE 1:

EQUIPMENT DESCRIPTION 1975

A. TYPEMAKER AND
TYPESETTING MACHINERY

PRODUCTION	108
IMPORTS	677
EXPORTS	30
MARKET SIZE	755

C. PRESSES AND OTHER PRINTING MACHINERY OXYLBFHGB TNA##

	1,664
IMPORTS	9,971
EXPORTS	646
MARKET SIZE	10,989

D. BOOKBINDING MACHINERY

PRODUCTION	80
IMPORTS	148
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EXPORTS	24
MARKET SIZE	204

TOTALS - A, B, C, AND D

PRODUCTION	2,692
IMPORTS	12,300
EXPORTS	191
MARKET SIZE	14,073

TABLE 1.1:

3) PHOTO TYPESETTING MACHINES

PRODUCTION	-
IMPORTS	298
EXPORTS	-

MABRIDA

C

KR	298
----	-----

7) PRINTING MATRIX

PRODUCTION	35
IMPORTS	50
EXPORTS	9
MARKET SIZE	76

9) PRINTING TYPE

PRODUCTION	28
IMPORTS	10
EXPORTS	12
MARKET SIZE	26

13) ACCESSORIES OF MACHINERY FOR TYPEMAKING
AND TYPESETTING, N.E.S.

PRODUCTION	4
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IMPORTS	65
EXPORTS	-
MARKET SIZE	69

TOTAL OF TYPEMAKING AND TYPESETTING MACHINERY

PRODUCTION	108
IMPORTS	677
EXPORTS	30
MARKET SIZE	755

C. PRESSES AND OTHER PRINTING MACHINERY

1) PRESS, OFFSET

PRODUCTION	300
IMPORTS	4,800
EXPORTS	20
MARKET SIZE	5,080

4) PRINTING PRESS, ROTARY

PRODUCTION	225
IMPORTS	2,000
EXPORTS	
MARKET SIZE	2,144

6) PRINTING MACHINES, OTHER THAN HAND OPERATED

PRODUCTION	
IMPORTS	1,650
EXPORTS	171
MARKET SIZE	1,879

8) PRINTING MACHINES, N.E.S.

PRODUCTION	
IMPORTS	1,349
EXPORTS	345
MARKET SIZE	1,649

NOTE BBY OC/T: ## TEXT AS RECEIVED.

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TOTAL OF PRESS AND OTHER PRINTING MACHINERY
PRODUCTION 1,664
IMPORTS 9,971
EXPORTS
MARKET SIZE 10,989

6) MACHINERY FOR MANUFACTURING BOOKS, N.E.S.
PRODUCTION
IMPORTS
EXPORTS
MARKET SIZE 117

TOTAL OF BOOKBINDING MACHINERY
PRODUCTION
IMPORTS
EXPORTS
MARKET SIZE 204

TABLE 2:

EQUIPMENT DESCRIPTION	1975
- TOTAL IMPORTS	
- MARKET FROM US	

A. TYPEMAKING AND TYPESETTING MACHINERY

1) PHOTO TYPESETTING SYSTEMS,
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COMPUTERIZED 200 30

2) OFFSET PLATE MAKING EQUIPMENT	74	40
3) OTHER TYPE MAKING AND TYPESETTING MACHINERY	81	60
TOTAL	755	130

C. PRESSES AND OTHER PRINTING MACHINERY

1) SHEET-FED OFFSET PRESSES	5,978	7,189
2) WEB-FED OFFSET PRESSES	1,429	1,665
3) FLEXOGRAPHIC PRESSES	99	-
4) COMPLETE SELF-CONTAINED BOOK PRINTING	-	-
5) OTHER PRESSES	3,483	1,117
TOTAL	10,989	9,971

TABLE 3:

COUNTRY	1975
-	IMPORT MARKET SHARE
-	VALUE PERCENT
-	(DOLS1,000)

A. TYPE MAKING AND TYPESETTING MACHINERY

UNITED STATES	130	19.2
JAPAN	410	60.6
GERMANY	77	11.4
UNITED KINGDOM	10	1.5
CANADA	47	6.9
FRANCE	1	0.1
HONGKONG	0	.0
OTHERS	2	0.3
TOTAL	677	100.0

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COUNTRY	1975
-	IMPORT KARKET SHARE
-	VALUE PERCENT
-	(DOLS1,000) ()

C. PRESSES AND OTHER PRINTING MACHINERY

UNITED STATES	4,800	48.1
JAPAN	2,900	29.1
GERMANY	1,800	18.1
UNITED KINGDOM	28	.3
CANADA	-	-

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ITALY	28	.3
SWITZERLAND	98	1.0
FRANCE	173	1.7
HONGKONG	34	.3
DENMARK	1	.0
SWEDEN	103	1.0
AUSTRIA	3	.0
OTHERS	3	.0
TOTAL	9,971	100.0

D. BOOKBINDING MACHINERY

UNITED STATES	52	35.1
JAPAN	47	31.8
GERMANY	25	16.9
UNITED KINGDOM	7	4.7
CANADA	-	-
SWITZERLAND	17	11.5
HONGKONG	0	.0
KOREA	-	-
OTHERS	-	-
TOTAL	148	100.0

GRAND TOTAL - A, B, C, AND D

UNITED STATES	5,211	42.4
JAPAN	4,371	35.5
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GERMANY	1,967	16.0
UNITED KINGDOM	72	.6
CANADA	47	.4

ITALY	54	.4
SWITZERLAND	211	1.7
FRANCE	174	1.4
HONGKONG	38	.3
DENMARK	37	.3
23\$,	105	.9
KOREA	4	.0
ARGENTINA	-	-
AUSTRIA	3	.0
OTHERS	5	.0
TOTAL	212,300	100.0

TABLE 3.1:

3) PHOTO TYPESETTING MACHINES

UNITED STATES	62	22.9
JAPAN	170	22.7
GERMANY	39	14.4
TOTAL	271	100.0

5) TYPE FOUNDDING MACHINES

JAPAN	84	100.0
TOTAL	84	100.0

12) PARTS OF MACHINERY FOR TYPEMAKING
AND TYPESETTING, N.E.S.

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UNITED STATES	41	36.3
JAPAN	33	29.2
GERMANY	38	33.6
FRANCE	1	1.0
HONGKONG	-	-
TOTAL	113	100.0

TOTAL OF TYPEMAKING & TYPESETTING MACHINERY

UNITED STATES	130	19.2
JAPAN	410	60.6
GERMANY	77	11.4
UNITED KINGDOM	10	1.5
CANADA	47	6.9
FRANCE	1	0.1
HONGKONG	0	0
OTHERS	2	0.3
TOTAL	677	100.0

C. PRESSES AND OTHER PRINTING MACHINERY

1) PRESS, OFFSET

UNITED STATES	3,000	65.1
JAPAN	654	14.2
GERMANY	735	15.9
UNITED KINGDOM	25	1.0
CANADA	-	-
SWEDEN	103	2.2
SWITZERLAND	92	2.0
TOTAL	4,609	100.0

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4) PRINTING PRESS, ROTARY

UNITED STATES	748	50.8
JAPAN	534	36.3
FRANCE	172	11.7
UNITED KINGDOM	-	-
DENMARK	-	-
HONGKONG	19	1.3
AUSTRIA	-	-
OTHERS	-	-
TOTAL	1,473	100.0

6) PRINTING MACHINES OTHER THAN HAND OPERATED

UNITED STATES	800	31.0
JAPAN	700	27.1
GERMANY	1,050	40.6
ITALY	16	1.0
SWITZERLAND	-	-

UNITED KINGDOM	-	-
HONGKONG	15	1.0
SWEDEN	-	-
OTHERS	3	.1
TOTAL	2,584	100.0

8) PRINTING MACHINES, N.E.S.

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UNITED STATES	246	21.7
JAPAN	848	74.8
UNITED KINGDOM	3	.3
GERMANY	15	1.3
ITALY	12	1.3
SWEDEN	-	-
SWITZERLAND	6	.5
HONGKONG	-	-
AUSTRIA	3	.3
OTHERS	-	-
TOTAL	1,133	100.0

TOTAL OF PRESSES AND OTHER PRINTING MACHINERY

UNITED STATES	4,800	48.1
JAPAN	2,900	29.1
GERMANY	1,800	18.1
UNITED KINGDOM	28	.3
CANADA	-	-
ITALY	28	.3
SWITZERLAND	98	1.0
FRANCE	173	1.7
HONGKONG	34	.3
DENMARK	1	.0
SWEDEN	103	1.0
AUSTRIA	3	.0
OTHERS	3	.0
TOTAL	9,971	100.0

6) MACHINERY FOR MANUFACTURING BOOKS, N.E.S.

UNITED STATES	50	45.0
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JAPAN	24	21.6
GERMANY	25	22.5

UNITED KINGDOM	7	6.3
SWITZERLAND	5	4.5
HONGKONG	-	-
CANADA	-	-
OTHERS	-	-
TOTALS	111	100.0
TOTAL OF BOOKBINDING MACHINERY		

UNITED STATES	52	35.1
JAPAN	47	31.8
GERMANY	25	16.9
UNITED KINGDOM	7	4.7
CANADA	-	-
SWITZERLAND	17	11.5
HONGKONG	0	.0
KOREA	-	-
OTHERS	-	-
TOTAL	148	100.0
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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 jan 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: n/a
Control Number: n/a
Copy: SINGLE
Draft Date: 28 jul 1978
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Decaption Note:
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Disposition Approved on Date:
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Disposition Event:
Disposition History: n/a
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Original Classification: UNCLASSIFIED
Original Handling Restrictions: n/a
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Previous Classification: n/a
Previous Handling Restrictions: n/a
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Retention: 0
Review Action: RELEASED, APPROVED
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Review Withdrawn Fields: n/a
SAS ID: 2038041
Secure: OPEN
Status: NATIVE
Subject: GLOBAL MARKET RESEARCH - GRAPHIC INDUSTRIES - EQUIPMENT, ROC
TAGS: BBSR, TW
To: COM
Type: TE
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Review Markings:
Sheryl P. Walter
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US Department of State
EO Systematic Review
20 Mar 2014
Markings: Sheryl P. Walter Declassified/Released US Department of State EO Systematic Review 20 Mar 2014